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# Foreign Crops and MARKETS



VOLUME 56

NUMBER 24

WORLD SUGAR SUMMARY (Page 426)

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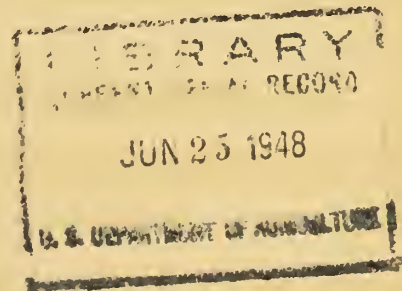
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FOR RELEASE

MONDAY

JUNE 14, 1948



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L A T E N E W S

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The major problem of farmers in Czechoslovakia is still the feeding of livestock, notwithstanding the fact that there has been a 25-35 percent reduction in animal numbers. Meadows and pastures are generally in very poor condition. The principal feed is straw. Supplies of corn, hay, beet pulp, and miscellaneous cakes are very low and most of the livestock are undernourished. No real alleviation in the feed situation is expected for at least two weeks, and not then unless the weather is favorable.

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Crop conditions in Yugoslavia, as reported in the press there, continue very good. Rainfall has been ample. Small grain production may be higher than in other postwar years. Corn plantings were conducted under satisfactory conditions and spring crops are well advanced. The area of industrial crops is reported large, although lack of hemp and flax has hampered sowings. A brief frost at the end of April caused slight damage to fruits. Prospects for grapes and prunes are good, but only fair for other fruits.

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The closing price of 64-70's, good medium fleeces at London for the third 1948 London series wool sales, averaged \$1.96 cents a pound, clean basis, an increase of 12 percent compared with the opening week of the sales, beginning April 30. Fine crossbred 56's were \$.99 cents a pound, an increase of 1 percent, and 46's crossbred were \$.52 cents a pound, no increase.



## WORLD 1947-48 SUGAR PRODUCTION UP 10 PERCENT

World production of beet and cane sugar for the 1947-48 season (revised) is estimated at 34,147,000 short tons (raw value), 10 percent more than the 31,150,000 tons produced in 1946-47 but 2 percent less than the 5-year (1935-39) average of 34,710,000 tons. Major increases this season in the United States, Cuba, the U.S.S.R., India, Formosa, Java and the Philippines more than offset a decrease in Europe generally where a late planting season and a dry summer combined to reduce beet sugar production below that of the previous year.

World beet sugar production showed further recovery from the wartime low levels and reached a total of 9,179,000 short tons (raw value) in 1947-48. This compares with 8,266,000 tons (revised) in 1946-47, 6,624,000 tons in 1945-46, and the prewar (1935-39) average of 12,025,000 short tons. The world totals of the beet sugar estimates by reason of material changes in the figures for the U.S.S.R. have been revised for the last 3 seasons. The production of beet sugar in Europe in 1947-48 was materially below prewar, but in all other important areas it was above the 1935-39 average.

Cane sugar production continued to expand in 1947-48 and set a new record high of 24,968,000 short tons. The current output is 9 percent larger than the 22,884,000 tons produced in 1946-47 and 10 percent greater than the 5-year (1935-39) average of 22,685,000 tons. A number of cane countries set new high records in 1947-48. India and Cuba, the major producers increased plantings and with favorable growing conditions, their output, exceeded the previous records by substantial margins. The high level of cane sugar production relative to prewar in Cuba and other Western Hemisphere countries, in Africa and India more than offset the decreases in Asia and Oceania, the two broad cane areas seriously curtailed by the war.

In North and Central America, including the West Indies, present indications point to a total production of cane and beet sugar of 12,091,000 short tons in 1947-48 compared with 11,441,000 tons in 1946-47 and the 5-year (1935-39) average of 7,801,000 tons. Sharp increases over the prewar years are reported for Mexico, the United States, and Cuba. In Cuba grinding is rapidly coming to a close largely because of heavy rains. Production to date has already exceeded the total output of last year, and probably would have been even larger than now indicated if the weather had not stopped harvesting at a number of mills.

The lateness of the planting season followed by a summer drought held back the recovery trend of European beet sugar from the wartime low levels. The 1947-48 output in Europe, exclusive of the U.S.S.R., totaled 5,010,000 short tons (raw value), compared with 5,675,000 short tons in 1946-47 and the 5-year (1935-39) average of 7,408,000 tons. Most of the western countries and Czechoslovakia show declines from a year earlier while many of the eastern countries show increases.

(Text continued on page 430; tables follow)

SUGAR (raw value): Production in specified countries a/  
averages 1930-34, 1935-39, and annual 1944-47

Countries by Continent	Average		1944	1945	1946	1947 b/
	1930-34	1935-39				
	1,000	1,000	1,000	1,000	1,000	1,000
	S. tons	S. tons	S. tons	S. tons	S. tons	S. tons
<b>NORTH AMERICA (cane)</b>						
British Honduras	0:	1:	1:	1:	1:	1
Canada (beet)	66:	76:	88:	88:	109:	87
Costa Rica	7:	9:	9:	9:	17:	19
El Salvador	23:	19:	20:	22:	32:	29
Guatemala	38:	38:	54:	64:	68:	83
Honduras	1:	2:	2:	2:	2:	2
Mexico	268:	364:	439:	444:	578:	701
Nicaragua	6:	9:	14:	15:	16:	20
Panama incl. Canal Zone	3:	5:	5:	7:	9:	12
United States (beet)	1,396:	1,520:	1,056:	1,278:	1,523:	1,832
United States (cane)	236:	474:	437:	475:	425:	376
<u>Caribbean</u>						
Antigua	19:	25:	23:	30:	27:	18
Barbados	90:	133:	111:	127:	99:	67
Cuba	2,847:	3,183:	3,923:	4,476:	6,448:	6,725
Dominican Republic	439:	491:	407:	504:	513:	463
Grenada	1:	1:	1:	1:	1:	1
Guadeloupe	40:	53:	31:	33:	34:	39
Haiti	28:	44:	50:	44:	50:	50
Jamaica	69:	119:	170:	199:	191:	225
Martinique	49:	62:	12:	26:	38:	50
Puerto Rico	894:	974:	964:	909:	1,038:	1,100
St. Shristopher	25:	36:	32:	36:	38:	39
St. Lucia and St. Vincent	6:	9:	8:	8:	8:	8
Trinidad and Tobago	121:	148:	86:	123:	123:	140
Virgin-Islands of the U.S.	3:	6:	4:	6:	3:	4
<b>Total NORTH AMERICA</b>	<b>6,675:</b>	<b>1,801:</b>	<b>1,947:</b>	<b>8,927:</b>	<b>11,441:</b>	<b>12,091</b>
<b>EUROPE (beet)</b>						
Austria	192:	196:	91:	20:	28:	45
Belgium	278:	259:	215:	155:	258:	155
Bulgaria	36:	24:c/	39:c/	21:c/	36:c/	22
Czechoslovakia	806:	721:	592:	493:	651:	386
Denmark	173:	257:	196:	203:	237:	239
Eire	37:	89:	103:	116:	64:	74
Finland	7:	13:	6:c/	5:c/	6:c/	10
France	1,112:	1,059:	366:	508:	842:	734
Germany	1,838:	2,122:	1,777:c/	860:c/	1,101:c/	862
Hungary	158:	139:c/	216:	8:	74:	146
Italy	397:	416:	65:	21:	293:	310
Netherlands	262:	255:	45:	66:	273:	245
Poland and Danzig	546:	548:	480:c/	216:c/	470:c/	547
Rumania	113:	129:c/	155:c/	38:c/	35:c/	88

SUGAR (raw value): Production in specified countries a/  
average 1930-34, 1935-39, and annual 1944-47

Countries by Continent	Average					
	1930-34	1935-39	1944	1945	1946	1947 b/
	1,000	1,000	1,000	1,000	1,000	1,000
	S. tons	S. tons	S. tons	S. tons	S. tons	S. tons
EUROPE (beet) (cont'd)						
Spain <u>d/</u>	374:	209:	177:	132:	195:	162
Sweden	252:	340:	308:	325:	320:	275
Switzerland	8:	12:	25:	31:	24:	26
United Kingdom	497:	527:	482:	605:	693:	531
Yugoslavia	89:	93:	19:	38:	75:	153
Total EUROPE (excl. USSR)	7,175:	7,408:	5,357:	3,861:	5,675:	5,010
USSR (Europe and Asia) <u>e/</u> (beet):	1,584:	2,887:	1,270:	1,200:	775:	2,050
ASIA (cane)						
Iran (beet)	4:	21:	28:	25:	40:	53
Turkey (beet)	41:	75:	110:	118:	118:	114
Burma	<u>f/</u>	78:	43:	20:	40:	40
China	285:	438:	350:	350:	369:	380
Manchuria (beet)	10:	14:	31:	30:	29:	29
Formosa	889:	1,202:	361:	95:	34:	287
French Indochina	59:	76:	80:	50:	45:	50
India <u>g/</u>	4,424:	5,369:	5,297:	5,094:	5,291:	5,815
Pakistan <u>g/</u>	658:	799:	842:	972:	954:	994
Japan <u>h/</u>	134:	167:	105:	50:	10:	20
Java and Madura <u>i/</u>	1,731:	1,447:	95:	22:	25:	160
Philippine Islands <u>j/</u>	1,177:	1,127:	75:	115:	180:	480
Total ASIA (excl. USSR)	9,412:	10,813:	7,417:	6,941:	7,135:	8,422
SOUTH AMERICA (cane)						
Argentina	381:	480:	506:	495:	700:	668
Brazil	1,105:	1,159:	1,344:	1,382:	1,633:	1,720
British Guiana	163:	209:	177:	184:	185:	200
Colombia	32:	47:	95:	95:	97:	117
Ecuador	22:	24:	27:	38:	39:	40
Paraguay	7:	7:	12:	9:	21:	18
Peru	441:	448:	468:	443:	474:	490
Surinam	21:	19:	5:	6:	4:	5
Uruguay (beet)	2:	2:	2:	2:	2:	2
Venezuela	23:	19:	42:	33:	36:	40
Total SOUTH AMERICA	2,197:	2,414:	2,678:	2,687:	3,191:	3,300
AFRICA (cane)						
Belgian Congo	5:	15:	15:	16:	16:	18
British East Africa	30:	63:	67:	68:	75:	102
Kenya	-:	-:	9:	9:	7:	15
Tanganyika	-:	-:	8:	8:	7:	8
Uganda	-:	-:	50:	51:	61:	79
Egypt	161:	167:	190:	198:	210:	235
Madagascar	8:	13:	13:	18:	14:	12
Madeira Islands and Azores	9:	9:	6:	7:	8:	8



SUGAR (raw value): Production in specified countries a/  
Averages 1930-34, 1935-39, and annual 1944-47

Countries by Continent	Average		1944	1945	1946	1947 b/
	1930-34	1935-39				
	1,000	1,000	1,000	1,000	1,000	1,000
	S. tons	S. tons	S. tons	S. tons	S. tons	S. tons
AFRICA (cane) (cont'd)						
Mauritius	236:	321:	223:	175:	320:	386
Mozambique	93:	79:	91:	79:	79:	88
Angola	26:	38:	58:	56:	56:	49
Reunion	64:	92:	14:	27:	58:	95
Union of South Africa	366:	498:	614:	553:	475:	512
Total AFRICA	998:	1,295:	1,291:	1,197:	1,311:	1,505
OCEANIA (cane)						
Australia	667:	894:	750:	746:	619:	674
Fiji	117:	143:	77:	61:	131:	145
Hawaiian Islands	1,042:	986:	821:	680:	872:	950
Japanese Mandated Islands	52:	69:	0:	0:	0:	0
Total OCEANIA	1,878:	2,092:	1,648:	1,487:	1,622:	1,769
Total (beet)	10,284:	12,025:	7,966:	6,624:	8,266:	9,179
Total (cane)	19,635:	22,685:	19,642:	19,676:	22,884:	24,968
TOTAL (beet and cane)	29,919:	34,710:	27,608:	26,300:	31,150:	34,147

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service Officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to prewar boundaries except as noted.

a/ Years shown are for crop years; generally the harvesting season begins in the fall months of the year shown or in the early months of the following year, except in certain cane-sugar-producing countries in the Southern Hemisphere, such as Australia, Argentina, Mauritius, Union of South Africa, etc., where the season begins in May or June of the year shown. b/ Preliminary. c/ Data not comparable with previous years because of boundary changes. d/ Includes a small quantity of cane sugar. e/ Includes Latvia and Lithuania. f/ Included in India. g/ Data for India are in terms of gur, a low grade of brown sugar. Includes Burma 1930-34 only. h/ Includes cane and beet sugar. i/ Data for Java are for the calendar years following the years shown. j/ Includes centrifugal and muscovado sugar.



The estimates of beet sugar production in the U.S.S.R. have been revised sharply downward for the last three years but the 1947-48 crop totaling 2,050,000 short tons (raw value) is still the largest since before the war. Information has now come to light that the 1946-47 beet crop was hit hard by drought, and sugar production totaled only 775,000 short tons, compared with around 1,200,000 tons in each of the two previous seasons. Sugar production in the U.S.S.R, although increased sharply in 1947-48, is still considerably below the prewar average of 2,887,000 short tons.

In Asia sugar production is making rapid progress with the current output showing considerable recovery in some of the war devastated areas. The total for the area is 8,422,000 short tons in 1947-48, compared with 7,135,000 tons in 1946-47 and the 5-year (1935-39) average of 10,813,000 tons. Production in Formosa, the Philippines and Java, the three areas where the industry was hit the hardest during the war, increased sharply this season over last but the output of each will be far below prewar levels. It is indicated that there was also a sharp increase in India where production is measured in terms of Gur, a low grade molasses type of sugar.

In South America, as a whole, sugar production continues to expand with the current season's output totaling 3,300,000 short tons setting a new high record. It compares with 3,191,000 tons in 1946-47 and a prewar average of 2,414,000 tons as compared with prewar totals, Argentina, Brazil, Columbia, and Peru show the greatest increases.

Sugar production in Africa is estimated at 1,505,000 short tons in 1947-48, compared with 1,311,000 tons in 1946-47 and 1,295,000 tons, the 1935-39 average. Increases this season were fairly general throughout the continent.

In Oceania, production in 1947-48 totals 1,769,000 short tons, compared with 1,622,000 tons in 1946-47 and the 5-year (1935-39) average of 2,092,000 tons. Although production in the Hawaiian and Fiji Islands has about recovered to prewar levels, production in Australia remains materially below.

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This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, Gustave Burmeister, Ruth G. Tucker, John H. Richter, and Constance H. Farnworth.

## COMMODITY DEVELOPMENTS

## GRAINS, GRAIN PRODUCTS AND FEEDS

## PHILIPPINE RICE PRICES

## CONTINUE HIGH

Wholesale prices of Philippine rice during the week ended May 22 rose slightly over those of the preceding week and nearly recovered to the season's high point of early April. Milled No. 1 Macan brought from \$11.17 to \$12.15 per 100 pounds compared with \$12.35 to \$12.95 during the second week of April. Prices during the remainder of April and in the first half of May, however, continued at a high level, ranging from \$10.93 to \$11.95 per 100 pounds. American remilled first-class during the week ended May 22 was from \$2.60 to \$3.58 per 100 pounds cheaper than domestic milled rice. Prices to producers continued to advance.

PHILIPPINES: Rice prices per 100 pounds, week ended May 22, with comparisons.

Date	Native, Macan Milled: Imported: Rough rice			
	ex-warehouse, Manila:		First	Delivered
	No. 1	No. 2	Class	Cabanatuan
	Dollars	Dollars	Dollars	Dollars
Nov. 1947-High.....	9.31:	9.11:a/	12.11:	5.29
Nov. 1947-Low.....	8.30:	7.90:a/	12.11:	4.54
April 26-May 1-High--	11.34:	10.93:b/	9.12:	6.80
April 26-May 1-Low--	10.93:	10.53:b/	9.12:	6.55
May 3-8-High.....	11.54:	11.14:b/	9.12:	7.06
May 3-8-Low.....	11.14:	10.73:b/	9.12:	6.55
May 10-15-High.....	11.54:	11.14:c/	8.57:	7.06
May 10-15-Low.....	11.34:	10.93:c/	8.57:	6.80
May 17-22-High.....	12.15:	11.54:c/	8.57:	7.31
May 17-22-Low.....	11.17:	11.14:c/	8.57:	7.31

From Daily Market Report, Bureau of Commerce, Philippine Government.  
a/ American. b/ From Siam. c/ American remilled.

## FRUITS, VEGETABLES AND NUTS

CANADA CHANGES IMPORT  
RESTRICTIONS ON POTATOES

Effective June 8, 1948 potatoes (including U.S. No. 1, size B) may again be imported into all of Canada under the exchange quota category for fruits and vegetables provided for in the original import control order issued by the Canadian Government last November. This change in the import restrictions was made necessary in order to provide additional supplies for consumption and to amend the Order issued April 21, 1948 which took potatoes out of the quota category and placed them on the embargoed list. The recent action does not change the provisions for



imports of U.S. No. 1, size B potatoes into British Columbia under a special allotment of exchange.

There is some question as to how much potato imports into eastern Canada will be stimulated under this change. First, no extra allotment of exchange has been provided, and second, the maximum markup by importers provided under the price ceiling regulations is said to be too low to permit as much profit on potatoes as on citrus fruits which are in the same category. It is possible that, if potatoes are not imported in sufficient volume under the current system, a special exchange quota will be provided for all of Canada.

### COTTON AND OTHER FIBER

#### COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rate of exchange:

COTTON: Spot prices in certain foreign markets, and the  
U.S. gulf-port average

Market location, kind, and quality	Date: 1948	Unit of weight	Unit of: currency	Price in: foreign: currency	Equivalent U.S. cents per pound
Alexandria		:Kantar			
Ashmouni, Good.....	6-3	: 99.05 lbs.	:Tallari	: 72.50:	60.49
Ashmouni, F.G.F.....	"	: "	: "	:	(not quoted)
Giza 7, Good.....	"	: "	: "	:	(not quoted)
Giza 7, F.G.F.....	"	: "	: "	:	(not quoted)
Karnak, Good.....	"	: "	: "	: 99.00:	82.60
Karnak, F.G.F.....	"	: "	: "	:	(not quoted)
Bombay		:Candy			
Jarila, Fine.....	"	: 784 lbs.	:Rupee	: 726.00:	27.94
Broach, Fine.....	"	: "	: "	: 905.00:	34.83
Sind American, Fine.....	"	: "	: "	:	(not quoted)
Punjab " 289-F, Fine..	"	: "	: "	:	(not quoted)
Kampala, East African.....	"	: "	: "	:	(not available)
Buenos Aires		:Metric ton			
Type B.....	6-4	: 2204.6 lbs.	:Peso	:3,150.00:	42.54
Lima		:Sp. quintal			
Tanguis, Type 5.....	6-3	: 101.4 lbs.	:Sol	: * 234.00:	35.50
Pima, Type 1.....	"	: "	:	: 280.00:	42.48
Recife		:Arroba			
Mata, Type 5.....	6-4	: 33.07 lbs.	:Cruzeiro:	155.00:	25.50
Sertao, Type 5.....	"	: "	: "	: 165.00:	27.15
Sao Paulo					
Sao Paulo, Type 5.....	"	: "	: "	: 187.50:	30.85
Torreon		:Sp. quintal			
Middling, 15/16".....	"	: 101.4 lbs.	:Peso	: 170.00:	34.49
Houston-Galveston-New					
Orleans Av.,Mid. 15/16"....	"	:Pound	:Cent	: XXXXXXXX:	37.38

Quotations of foreign markets reported by cable. U. S. quotations from designated spot markets.

\*Nominal.

# BELGIAN CONGO SISAL PRODUCTION DECREASES

Commercial production of sisal in Belgian Congo in 1947 is estimated at approximately 331,000 pounds from less than 1,800 acres, or less than the 1946 crop of 448,000 pounds and only 63 percent of the peak wartime crop of 529,000 pounds in 1944. The 1948 crop was forecast early in January at between 400,000 and 450,000 pounds. Expansion of plantings is not probable as long as jute, rubber, cocoa, palm oil, and other agricultural commodities continue to be in as great demand as they are at the present time.

Sisal is cultivated almost entirely in the southwestern part of the country, although Ruanda-Urundi production often is reported with that of the Belgian Congo. Fiber produced on plantations by Europeans is used both for export and for domestic consumption. Native production is used almost entirely for local consumption in the manufacture of cordage for domestic use. Acreage under native cultivation was reported approximately at from 10,000 to 20,000 acres before World War II. Production from this source is relatively small and is graded somewhat lower than plantation sisal.

Exports of sisal from Belgian Congo averaged about 550,000 pounds in the prewar years 1935-38, and were all shipped to Belgium. No sisal was exported in 1941 and 1942, but 542,000 pounds were exported in 1943 and 434,000 in 1944. All exports during 1943 and 1944 were shipped to the United States. In 1945 and 1946 all exported sisal was shipped to Belgium and amounted to about 225,000 pounds a year. During the first 9 months of 1947 a total of 240,000 pounds was shipped to Belgium.

The average export price for the years 1943-46 was the equivalent of 6.3 cents per pound (converted at the rate of 1 Belgian Congo franc equals \$0.022357). In 1938 the average export value was about 1.9 cents per pound. (Converted at 1 franc = \$0.022599).

Belgian Congo: Sisal area, production, and exports of plantation sisal, average 1941-45, and years 1938, 1946, and 1947.

Year	Area planted	Fiber production	Fiber exports	
			Quantity	Value
	Acres	Pounds	Pounds	Dollars
1938	3,100	441,000	434,000	8,415
1941-45 (Average)	1,500	384,000	218,000	12,435
1946	1,800	448,000	339,000	27,577
1947	1,800	331,000	a/240,000	b/

a/ First nine months only. b/ Not available.

Compiled from Foreign Service Reports and Statistique du Commerce Extérieur du Congo Belge.

## TROPICAL PRODUCTS

### CEYLON REQUESTS RELEASE FROM CACAO ALLOCATION

The Ceylon Government and the Ceylon cacao growers have requested release from the International Emergency Food Committee's cacao bean allocation in the hope of obtaining higher prices for cacao than presently prevail. Various countries have not lifted all the Ceylon cacao allotted to them. Ceylon



wishes permission to dispose of unsold beans regardless of the allocation program. The IEFC so far has not acted on the request.

Ceylon cacao is a flavor grade and therefore sells at higher prices than ordinary cacaos. Floor prices for cacao beans as announced by the Ceylon Government Controller of Exports on March 17, 1948, were substantially higher than the prices announced December 17, 1947. Under the new schedule, the f.o.b. floor price per 112 pounds of Estates No. 1 Ceylon cacao is Rs.180 (48.8 cents U.S. currency) compared with Rs.135 (36.6 cents U.S. currency) in December 1947.

Practically all the cacao produced in Ceylon is available for export as domestic consumption is negligible. The 1947-48 crop is estimated from 4.1 to 4.8 million pounds.

CEYLON: Exports of cacao beans by country of destination, 1947 with comparisons

Destination	:Average : :1935-39 : : 1,000 : : pounds :	: 1945 : : 1,000 : : pounds :	: 1946 : : 1,000 : : pounds :	: 1947 a/ : : 1,000 : : pounds :
United Kingdom	: 1,399 :	: 527 :	: b/ :	: 224 :
Sweden	: 5 :	: - :	: - :	: 224 :
Switzerland	: 4 :	: 109 :	: 258 :	: 190 :
Turkey in Europe	: b/ :	: 467 :	: 35 :	: 224 :
Other Europe	: 530 :	: - :	: - :	: - :
Canada	: 1,053 :	: - :	: - :	: - :
United States	: 259 :	: 338 :	: - :	: - :
Other Western Hemisphere	: 333 :	: - :	: - :	: - :
Egypt	: 39 :	: 1,051 :	: 979 :	: 801 :
Union South Africa	: 131 :	: 176 :	: 183 :	: 255 :
Philippines	: 3,534 :	: - :	: 572 :	: 684 :
British India	: 2 :	: 234 :	: 366 :	: 297 :
Palestine	: 49 :	: 1,095 :	: 482 :	: 733 :
Australia	: 314 :	: 484 :	: 141 :	: 439 :
New Zealand	: 132 :	: 43 :	: 34 :	: 25 :
Other	: 147 :	: - :	: - :	: 1 :
Total	: 7,931 :	: 4,524 :	: 3,050 :	: 4,097 :

SOURCE: Ceylon Customs Returns.

a/ Preliminary: b/ Less than 1,000 pounds.

#### PERU AGAIN PROHIBITS COFFEE EXPORTS

By Resolution No. 501 of May 8, 1948, the Peruvian Government again prohibits the export of coffee in order to assure sufficient supplies for domestic consumption and to prevent hoarding and speculation. The preamble to the Resolution also states that it is deemed inadvisable to permit the export of good quality domestic coffee which is being replaced by imported coffee of poor quality.

The export prohibition of June 1947 was suspended last October, and the export of limited quantities of Peruvian coffee was authorized

providing that coffee exported was replaced by the import of equivalent amounts. During 1947, Peru exported 13,837 bags of coffee, principally to the United States, and imported 9,650 bags, all from Ecuador.

It appears that the 1948 coffee harvest will not be much larger than last year's small crop of 76,000 bags. It is therefore unlikely that the export prohibition will be relaxed in 1948.

#### FIRST QUARTER EXPORTS OF INDIAN PEPPER SMALLER

Approximately 6,324,000 pounds of black pepper were exported from India during the first quarter of 1948 compared with 9,309,000 pounds during the corresponding quarter of 1947. Over half the January-March 1948 pepper exports, or 3,213,000 pounds were destined to the United States. The Netherlands received 1,226,000 pounds, the United Kingdom 577,000, other European countries 799,000, and all other countries 509,000 pounds.

The Chief Controller of Exports in India recently announced that exports of pepper again would be controlled in order to insure the maximum amount of dollar exchange. Licenses will be issued freely for exports to the United States.

Interior and port stocks of pepper as of March 31, 1948, were estimated at 26,880,000 pounds, of which 11,200,000 pounds were in the Alleppey area and 15,680,000 pounds in the Tellicherry area. The 1947-48 pepper crop, harvested from December to March, still is estimated by the trade at 38,100,000 pounds, compared with 44,800,000 pounds last season.

Prices for pepper in India reached an all-time high of Rs.142-8-0 per hundredweight, (about 38 cents per pound U.S. currency) ex warehouse Alleppey during the January - March quarter, and closed at this figure on March 31, 1948. Most of the 1947-48 crop is reported to have been sold by forward contracts. There has been some difficulty in meeting commitments, and rumor that pepper stocks covered by previous contracts have been bought back at a premium.

#### FATS AND OILS

##### URUGUAY HAS RECORD EDIBLE OILSEED CROPS

Uruguay has harvested record crops of sunflower seed and peanuts, according to the second official estimate. The edible oil from these crops is expected to meet domestic requirements for 1948, but there will be none for export.

Sunflower seed production is estimated at 60,850 short tons from 205,200 acres compared with 26,600 tons from 193,860 acres in 1946/47. This season's yield per acre of 593 pounds is more than double that of last year and much above average for this country.

The principal sunflower producing areas are the Departments of Colonia, Cerro-Largo, and Rocha, but small quantities are grown in all departments.

An official decree issued in March set the price for sunflower seed at 250 pesos per metric ton (\$120 per short ton). Recent reports, however, indicate that seed is selling at 275 pesos (\$131) in Montevideo.

Some sunflower seed cake will be exported during the current year. In 1947, shipments amounted to approximately 16,800 tons. The recipients were Sweden 10,504 tons, the Netherlands 2,076, Finland 1,893, Belgium 1,173, Switzerland 827, Denmark 164, and Barbados 141 tons.

Peanut production, estimated at 17,830 tons, is almost four times the size of last years harvest, and the yield per acre exceeds that of any previous year. Usually the yield of peanuts in Uruguay is very low and the oil content of the nuts is also low. Most of the peanuts are grown on the sandy soils of Rivera, Tacuarembó, and Salto. Production in other departments is negligible. The oil is preferred to sunflower oil and is used chiefly for blending. The established price for peanuts from the 1947-48 crop is 300 pesos per metric ton (\$143 per short ton). Exports of peanut oil cake may equal the 2,600 tons shipped in 1947.

#### FRANCE FORECASTS LARGER OILSEED ACREAGE

France's total oilseed acreage, as of May 1, 1948, is forecast at 258,000 acres. Condition of the crops is reported favorable and yields are expected to be about average. Of this year's area, 200,000 acres are planted to winter oilseeds (chiefly rapeseed) compared with 121,000 in 1947 and approximately 300,000 acres in 1946. The 1947 figure is not entirely comparable since many of the original plantings of that season were destroyed by frost.

It is apparent that the planting of winter oilseeds is in marked decline. This is not true of all parts of France, however; in a region comprising the Departments of Aisne, Ardennes, Oise, and Somme, the area increased from 45,000 acres in 1946 to 65,500 in 1948. In some sections of the country, rapeseed is being used for forage because of the current low supplies of feed.

FRANCE: Estimated oilseed acreage, May 1, 1948 with comparisons.

Oilseed	May 1, 1946	May 1, 1947	May 1, 1948	Percentage 1948 if of:	
				1946	1947
	Acres	Acres	Acres	Percent	Percent
Colza a/ .....	240,690	103,369	184,752	77	179
Navette a/ ....	66,452	29,689	31,073	47	105
Poppy .....	17,685	10,428	7,339	41	70
Sunflower .....	5,733	2,842	2,105	37	74
Others .....	9,514	58,167	32,790	345	56
Total .....	340,074	204,495	258,059	76	126

Ministry of Agriculture.  
a/ Varieties of rapeseed.



The area under spring oilseeds is estimated at 58,000 acres, a noted decrease from the 84,000 acres in 1947 when spring plantings were exceptionally large to compensate for the destruction from winter freeze. This year's acreage is well above that of 1946, especially for mustard and sofflower seed.

U. S. EXPORTS OF FATS AND OILS IN  
JANUARY-APRIL EXCEED PREWAR AVERAGE

United States exports of specified fats, oils, and oilseeds (in terms of oil) amounting to 303.4 million pounds during January-April 1948, were 28 percent larger than in the corresponding months of last year and 26 percent above the prewar (1935-39) annual average. In that period only soybeans, cottonseed oil, cooking fats, and lard were greater than in the first four months of the current year.

UNITED STATES: Exports of specified fats, oils, and oilseeds,  
April 1948 with comparisons

Commodity	Unit	Average :1935-39	1946	1947	January-April	
					1947	1948
Soybeans.....	1,000 bu.	a/4,793	2,906	1,683	566	1,752
Soybean oil:						
Refined.....	" lbs	b/6,467	72,583	38,450	9,283	19,482
Crude.....	" "		13,228	69,130	8,608	23,321
Coconut oil:						
Refined.....	" "	3,789	935	5,691	484	6,488
Crude.....	" "	10,442	47,366	52,849	21,492	5,345
Cottonseed oil:						
Refined.....	" "	4,793	5,857	10,942	1,260	17,535
Crude.....	" "	1,515	244	901	21	1,963
Linseed oil.....	" "	1,280	1,625	7,721	326	4,947
Peanuts:						
Shelled.....	" "	b/452	61,043	211,010	101,708	204,442
Not shelled.....	" "		7,066	18,681	11,704	3,238
Peanut oil, refined....	" "	c/325	75	1,579	9	620
Cooking fats.....	" "	2,111	11,424	3,582	1,614	1,048
Lard.....	" "	165,636	430,682	354,184	129,759	112,545
Oleomargarine.....	" "	180	50,483	19,954	8,030	2,137
Tallow.....	" "					
Edible.....	" "	b/(1,651	4,151	601	51	1,165
Inedible.....	" "		6,472	55,051	6,536	8,322

Compiled from official sources.

a/ Average of less than 5 years. b/ Not separately classified in Foreign  
Commerce and Navigation. c/ 1939 only.



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ECONOMIC DEVELOPMENTS

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RECENT CANADIAN  
TRADE DEVELOPMENTS

The implementation of Canada's dollar conservation program, designed to reduce the unfavorable balance of that country's trade with the United States, has resulted in a reduction of almost 50 percent in her merchandise trade deficit, or from \$203 million for January-March, 1947 to \$108 million for the corresponding period of 1948. Canada's debit trade balance for March, 1948, amounted to \$24 million, the lowest monthly figure since December, 1945.

Canadian exports (including re-exports) to the United States for the first quarter of 1948 increased by 34.5 percent over the corresponding quarter for the previous year, while the United States export trade with the Dominion, declined in the total by 3.4 percent in the same comparative period.

The overall trade balance for the January-March, 1948 quarter showed a small increase in total imports and a larger increase in total exports, the result being an increase in the excess of exports over imports of from \$44 million to \$95 million, due largely to the credits granted by Canada to the United Kingdom and other European countries.

The further development of United States trade with Canada apparently depends partly on the amount of supplementary dollar resources Canada may obtain through United States purchases there in connection with this country's foreign assistance programs.

